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METROPOLITAN WASHINGTON, D.C.

AREA LABOR SUMMARY

THE D.C. DEPARTMENT OF EMPLOYMENT SERVICES

DATA FOR NOVEMBER 1989 JANUARY 1990

D.C. Unemployment Increases in November To 4.7%

Second Lowest Rate for November in Past 18 Years

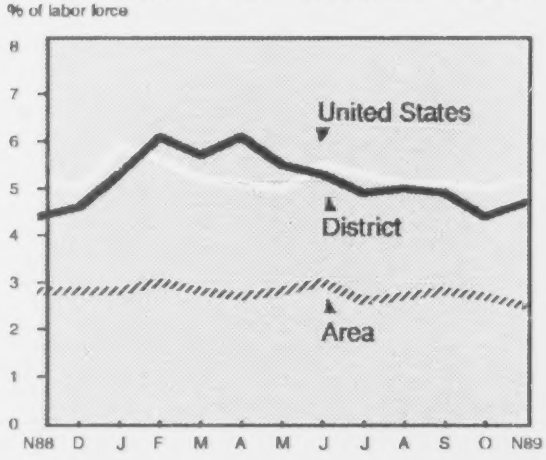
Labor Force

Between October and November 1989, the District's unemployment rate increased from 4.4 percent to 4.7 percent of the labor force. This was, however, the second lowest unemployment rate for November in eighteen years. Only the November 1988 rate of 4.4 percent was lower. Unemployment rates in the suburbs and the Area declined in November reflecting the traditional hiring expansion associated with increased shopping for the holidays. The November suburban jobless rate was 2.1 and the Area's 2.5 percent. Across the United States, the unadjusted civilian unemployment rate was 5.2 percent. This was the sixth consecutive month that the District's rate was below the U.S. rate.

The District

In November, 312,700 District residents held jobs. With the exception of November 1988, this was the largest number of residents on November payrolls since 1975. Over the month, however, 3,200 residents left jobs and 2,300 withdrew from the labor force. As a result, 800 residents were added to the unemployment roster and the rate rose three-tenths of a percentage point to 4.7 percent.

Unemployment Rates
November 1988 - November 1989



A similar pattern occurred over the year. Compared to November 1988, there are 3,700 fewer District residents in the job market and 4,600 fewer employed. Thus, the jobless rolls in the City increased by 900 and the rate rose to 4.7

Continued on page 3

Government of the District of Columbia
Marion Barry, Jr., Mayor

Department of Employment Services
F. Alexis H. Roberson
Director

The Department of Employment Services

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METROPOLITAN WASHINGTON, D.C.

AREA LABOR SUMMARY

THE D.C. DEPARTMENT OF EMPLOYMENT SERVICES

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Inquiries and requests for labor market information may be obtained by writing to the above address, or by calling: (202) 639-1641 or 639-1642.

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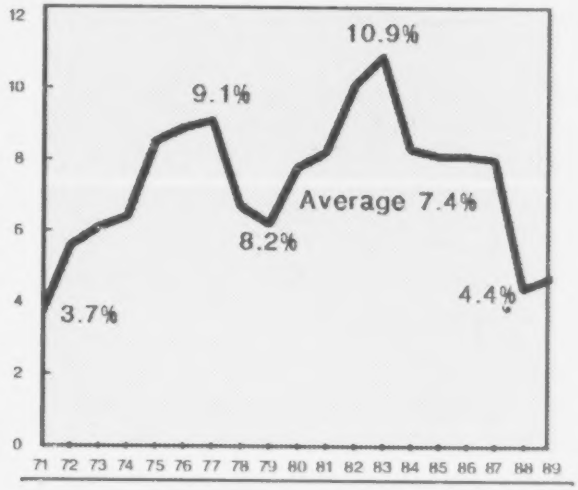
percent. Despite tight labor markets, fewer District residents are in the job market this year compared to last year. Perhaps, District residents are beginning to experience more discouragement associated with work related activities.

District Unemployment Rates In the Month of November 1971 - 1989



The Area & Suburbs

The monthly and over-the-year patterns in the suburbs differed from the City. In the suburbs, both the labor force and employment have expanded, whereas unemployment and the unemployment rate have declined. In November, 2,100 more suburbanites joined the labor market and 7,000 more found work. As a result, 4,900 people withdrew from the jobless rolls and the unemployment rate dropped to 2.1 percent of the labor force.

Over the past year, (November 1988 to November 1989), the suburban labor market expanded by 79,400 new workers, an increase of 4.2 percent. On the other hand, the number of jobs held by suburbanites increased by an even larger 4.6 percent, or 85,100. Since the employment expansion exceeded the increase in the supply of new workers, it resulted in a 12.1 percent decline in the pool of available jobless workers. This 5,700-person reduction in the labor reserve occurred in a labor market which was already very tight.

Because the suburban labor force is nearly six times the size of the District's, the Washington Area patterns generally reflect suburban activity. Thus over the past year, the Area's expansion in employment has exceeded the growth in the labor supply, and the pool of unemployed has shrunk. Consequently, the Washington Area continues to have one of the tightest labor pools in the nation.

Unemployment Rates in the Washington, D.C. MSA by City and County

	Nov.a/ 1989	Oct.b/ 1989	Nov.b/ 1988
District of Columbia	4.7	4.4	4.4
Prince Georges County	2.9	3.2	3.7
Calvert County	2.9	3.2	3.6
Charles County	2.5	2.2	2.9
Frederick County	2.2	2.5	2.6
Stafford County	2.2	2.3	2.1
Montgomery County	2.1	2.3	2.5
Alexandria City	1.9	2.4	2.1
Prince William County	1.9	2.2	2.0
Fairfax City	1.7	2.2	1.9
Arlington County	1.7	2.0	1.9
Fairfax County	1.6	1.9	1.7
Falls Church City	1.6	1.9	1.8
Loudoun County	1.6	1.9	1.5
Manassas City	1.5	1.8	2.0
Manassas Park City	1.3	1.5	1.6

a/ Preliminary.
b/ Revised.
SOURCE: The Department of Employment Services, the Maryland Department of Economic and Employment Development, and the Virginia Employment Commission.

THE DEPARTMENT OF EMPLOYMENT SERVICES

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Employment Status for the Civilian Population
District of Columbia, Suburban Ring, and the Washington, D.C. MSA
November 1989[a]

	Nov.[b] 1989	Oct.[c] 1989	Net Change From Nov.[d] 1988	Oct.[d] 1988	Oct.[c] 1989	Nov.[c] 1988
Washington, D.C.						
Civilian Labor Force	328,000	330,300	331,700	334,700	-2,300	-3,700
Total Employed	312,700	315,900	317,300	317,000	-3,200	-4,600
Total Unemployed	15,300	14,500	14,400	17,700	800	900
Unemployment Rate[e]	4.7	4.4	4.4	5.3	0.3	0.3
Suburban Ring						
Civilian Labor Force	1,959,500	1,957,400	1,880,100	1,863,900	2,100	79,400
Total Employed	1,917,900	1,910,900	1,832,800	1,818,900	7,000	85,100
Total Unemployed	41,600	46,500	47,300	45,000	-4,900	-5,700
Unemployment Rate[e]	2.1	2.4	2.5	2.4	-0.3	-0.4
Washington, D.C. MSA						
Civilian Labor Force	2,287,500	2,287,700	2,211,800	2,198,600	-200	75,700
Total Employed	2,230,600	2,226,800	2,150,100	2,135,900	3,800	80,500
Total Unemployed	56,900	61,000	61,700	62,700	-4,100	-4,800
Unemployment Rate[e]	2.5	2.7	2.8	2.9	-0.2	-0.3

a Detail may not add to the totals due to independent rounding. b. Preliminary. c. Revised.
d. Data reflects Benchmark Revisions. e. Seasonally unadjusted.

Estimated Labor Force and Employment for the Washington Metropolitan Area includes the District of Columbia; the Virginia cities of Alexandria, Fairfax, Falls Church, Manassas and Manassas Park; the Virginia Counties of Fairfax, Arlington, Prince William, Loudoun, and Stafford; and the Maryland Counties of Montgomery, Prince Georges, Charles, Frederick, and Calvert.

Source: Prepared by the Department of Employment Services, Labor Market Information and Research Staff in cooperation with the Virginia Employment Commission, the Maryland Department of Economic and Employment Development, and the U.S. Bureau of Labor Statistics.

Characteristics of the Insured Unemployed

The number of individuals receiving unemployment insurance (UI) benefits totaled 8,045 in November 1989 down 543 claimants from October. In November, 52 percent of all UI recipients were males. Occupationally, professional, technical and managerial workers accounted for 28 percent of the total claimants. This was followed by clerical and sales with 26 percent. Service workers ranked third accounting for 21 percent of the claimants.

The median duration of the current spell of insured unemployment was 10.4 weeks for all claimants in November. Over the month, the duration for males remained unchanged at 10.2 weeks, while that for females increased from 10.5 weeks to 10.6 weeks. In November 1988, the average duration for males was 9.8 weeks and for females 9.9 weeks.

Job Growth

The District

The number of jobs in the District increased by 2,300 for a gain of 0.3 percent between October and November. The private sector accounted for 70 percent of the growth with seasonal growth in Retail Trade (900 jobs) and Services (600 jobs). Hiring for the holiday shopping season was responsible for the significant growth in Retail Trade.

The public sector grew by 700 jobs with gains in both Federal Government (200 jobs) and State

Continued on page 5

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and Local Government (500 jobs).

Over the year (November 1988 to November 1989), the number of District jobs increased by 2.5 percent for a gain of 16,900 jobs. The private sector grew at a rate of 3.4 percent, generating 13,600 jobs and accounting for 80 percent of all new jobs. The leading job producer, Services, contributed 11,300 jobs and accounted for 83 percent of private sector growth. The major components of Services growth were Business Services (3,200 jobs), All Other Services (3,000 jobs), Legal Services (1,700 jobs), Health Services (1,600 jobs), and Hotels (1,000 jobs). An additional 1,300 jobs were generated by Wholesale and Retail Trade.

The public sector increased by 1.9 percent with growth in Federal Government (4,100 jobs) partially offset by a decline in State and Local Government (800 jobs).

The Suburbs

The number of suburban jobs increased 0.4 percent for a gain of 5,800 jobs between October and November. The private sector accounted for half of the increase with seasonal growth in Retail Trade (5,100 jobs), partially offset by a seasonal decline in Construction (3,100 jobs). The Virginia suburbs were responsible for 57 percent of the Trade growth and 84 percent of the Construction decline.

The public sector increased 0.9 percent with gains in both Federal Government (200 jobs) and State and Local Government (2,600 jobs). Sixty-two percent of the State and Local Government growth occurred in the Maryland Suburbs while the Virginia suburbs were responsible for the increased Federal jobs.

Over the year (November 1988 to November 1989), suburban jobs grew at a rate of 3.8 percent for a gain of 58,500 jobs. The Virginia suburbs grew at a rate of 5.6 percent accounting for 73 percent of suburban growth while the Maryland suburbs increased at a rate of 2.0 percent.

The private sector accounted for 79 percent of suburban growth with the major job contributors, Services (22,500 jobs) and Trade (10,200 jobs), responsible for 70 percent of private sector growth. Eighty percent of the Services growth and 68 percent of the Trade increase occurred in the Virginia suburbs. The Virginia suburbs were also responsible for 83 percent of the growth in Transportation, Communications and Public Utilities (6,300 jobs); Finance, Insurance and Real Estate (4,700 jobs); and Construction (3,500 jobs).

The public sector grew at a rate of 3.9 percent with gains in both Federal Government (3,700 jobs) and State and Local Government (8,300 jobs). The Federal job growth occurred in the Virginia suburbs while the Maryland suburbs were responsible for 58 percent of the new State and Local Government jobs.

The Area

The Washington Metropolitan Area gained 8,200 jobs between October and November for an increase of 0.4 percent. The private sector was responsible for 56 percent of the growth with seasonal gains in Retail Trade (5,900 jobs) resulting from hiring for the holiday shopping season.

The public sector increased by 3,600 jobs with gains in both Federal Government (400 jobs) and State and Local Government (3,100 jobs).

Over the year (November 1988 to November 1989), the Area grew at a rate of 3.4 percent for a gain of 75,300 jobs. The private sector grew at a rate of 3.7 percent, generating 60,000 jobs and accounting for 80 percent of all new area jobs. The leading job producers, Services (33,900 jobs) and Wholesale and Retail Trade (11,500 jobs), were responsible for three-fourths of all new private sector jobs. Significant private sector growth also occurred in Transportation, Communications and Public Utilities (6,900 jobs), Finance, Insurance and Real Estate (4,700 jobs) and Construction (4,100 jobs).

The public sector grew at a rate of 2.6 percent with growth in both Federal Government (8,100 jobs) and State and Local Government (7,400 jobs).

Wage and Salary Employment by Industry and Place of Work [a]
(in thousands)

INDUSTRY	District of Columbia			Metropolitan Area		
	Nov. [b] 1989	Oct. [c] 1989	Nov. [c] 1988	Nov. [b] 1989	Oct. [c] 1989	Nov. [c] 1988
TOTAL	**694.9**	**692.6**	**678.0**	**2,281.3**	**2,273.1**	**2,206.0**
Total Private Sector	**418.4**	**416.8**	**404.8**	**1,685.8**	**1,681.2**	**1,625.8**
Total Government	**276.5**	**275.8**	**273.2**	**595.5**	**591.9**	**580.2**
Manufacturing	**16.1**	**16.0**	**16.4**	**86.5**	**86.5**	**87.6**
Total Durables	N/A	N/A	N/A	40.9	41.1	41.6
Stone, Clay, Glass, and Concrete Products	N/A	N/A	N/A	3.3	3.5	3.4
Electrical & Electronic Machinery, Equip., & Supp	N/A	N/A	N/A	18.4	18.4	18.9
All Other Durables	N/A	N/A	N/A	19.1	19.3	19.3
Total Non-Durables	N/A	N/A	N/A	45.7	45.4	46.0
Food & Kindred Products	N/A	N/A	N/A	4.9	4.8	4.7
Printing & Publishing	13.3	13.3	13.4	35.2	35.1	35.5
All Other Non-Durables	N/A	N/A	N/A	5.6	5.6	5.8
All Other Manufacturing	2.7	2.7	3.0	N/A	N/A	N/A
Mining	**0.1**	**0.1**	**0.1**	**1.1**	**1.1**	**1.2**
Construction	**13.6**	**13.5**	**13.0**	**149.1**	**152.1**	**145.0**
Transportation, Communications & Public Utilities	**25.6**	**25.5**	**25.0**	**117.0**	**115.7**	**110.1**
Railroad	N/A	N/A	N/A	5.0	5.0	5.0
Transportation ex. Railroad	N/A	N/A	N/A	58.2	57.3	53.0
All Transportation	9.8	9.9	9.5	N/A	N/A	N/A
Communication & Public Utilities	15.8	15.6	15.5	53.7	53.3	52.2
Trade	**68.6**	**67.8**	**67.3**	**450.3**	**444.4**	**438.8**
Wholesale	9.3	9.4	9.0	77.3	77.3	76.2
Retail	59.3	58.4	58.4	373.0	367.1	362.6
General Merchandise	5.0	4.7	4.7	46.8	43.6	44.3
Food	N/A	N/A	N/A	49.5	48.9	47.9
Automotive	N/A	N/A	N/A	38.7	38.9	38.9
Apparel & Accessories	N/A	N/A	N/A	29.0	27.9	29.4
Eating & Drinking Places	28.9	29.0	28.4	118.9	118.8	114.5
All Other Retail	25.4	24.7	25.2	90.2	88.8	87.7
Finance, Insurance & Real Estate	**34.8**	**34.9**	**34.8**	**133.6**	**133.1**	**128.9**
Banking	6.9	6.9	6.8	25.3	25.2	23.9
All Other	28.0	28.0	28.0	108.3	108.0	105.0
Services	**259.6**	**259.0**	**248.3**	**748.1**	**748.4**	**714.2**
Hotels & Other Lodging Places	16.6	16.6	15.6	39.8	39.5	36.9
Personal Services	4.2	4.2	4.0	23.4	23.3	23.4
Business Services	59.2	59.5	56.0	N/A	N/A	N/A
Computer & Data Process	6.1	6.2	5.6	N/A	N/A	N/A
Health Services	37.3	37.2	35.7	N/A	N/A	N/A

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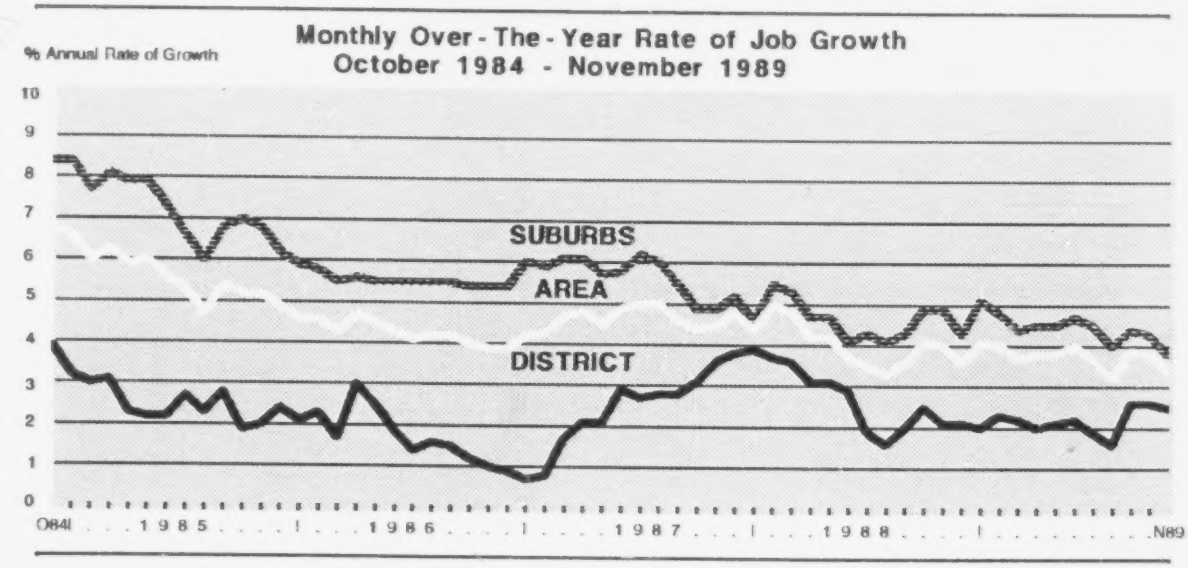
Wage and Salary Employment by Industry and Place of Work [a]
(in thousands)

INDUSTRY	District of Columbia			Metropolitan Area		
	Nov. [b] 1989	Oct. [c] 1989	Nov. [c] 1988	Nov. [b] 1989	Oct. [c] 1989	Nov. [c] 1988
Legal Services	29.6	29.2	27.9	N/A	N/A	N/A
Membership Organizations	33.2	33.1	32.6	N/A	N/A	N/A
All Other Services	79.5	79.2	76.5	684.9	685.6	654.0
Government	**276.5**	**275.8**	**273.2**	**595.5**	**591.9**	**580.2**
Federal Government	220.6	220.4	216.5	366.5	366.1	358.7
State & Local Government	N/A	N/A	N/A	228.9	225.8	221.5
State & Local Gov. Except Public Transportation	50.7	50.2	51.8	N/A	N/A	N/A
Public Transportation	5.2	5.2	4.9	N/A	NA	N/A

a. Detail may not add to totals due to independent rounding. b. Preliminary. c. Revised.

Data includes all full- and part-time employees who worked during or received pay for any part of the pay period which includes the 12th of the month. Proprietors, self-employed, unpaid family workers, and private household workers are excluded.

Source: Prepared by the Department of Employment Services, Labor Market Information and Research Staff in cooperation with the Virginia Employment Commission, the Maryland Department of Economic and Employment Development, and the U.S. Bureau of Labor Statistics.


Monthly Over-The-Year Rate of Job Growth
October 1984 - November 1989
% Annual Rate of Growth
10
9
8
7
6
5
4
3
2
1
0
SUBURBS
AREA
DISTRICT
O84I . . . 1985 . . . . I . . . 1986 . . . . I . . . . 1987 . . . I . . . 1988 . . . . I N89

Area Job Growth Rates

Over the past 61 months, (October 1984 to November 1989), the Washington Area has created new jobs at a rate of 4.6 percent. Measured by monthly over-the-year changes, however, the rate of growth has been steadily declining after peaking at 6.8 percent in December 1984. Between November 1988 and November 1989, the Area's job growth slowed to 3.4 percent. The over-the-year rate this November was smaller than the 4.0 percent recorded in November of last year.

The Suburban portion of the Area is still the generator of most new jobs, having grown over the past year at a rate of 3.8 percent, but at a much slower pace than its 61-month long-term average of 5.6 percent. Compared to the same period last year, growth was slower than the 4.9 percent registered in November 1988. Over the past year, the District proper has added new jobs at a rate of 2.5 percent and above its 61-month average of 2.4 percent. In November 1988, the annual job creation rate in the City was also 2.1 percent.

In absolute terms, job creation in the Area has declined from 116,000 new jobs produced between November 1983 and November 1984, to 75,300 between November 1988 and November 1989. Over the past year, 58,400 new jobs were added to the Suburban economy and 16,900 in the District. **The Washington Area continues to create new jobs at a faster pace than the U.S. economy (3.4 percent vs. 2.1 percent for the U.S. economy).**

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Profile of Job Growth Rates
October 1984 to November 1989

The Area	
Average 61 months	4.6%
High, December 1984	6.8%
Low, August 1989	3.2%
1-year ago	4.0%
Current month	3.4%
The Suburbs	
Average 61 months	5.6%
High, January 1985	8.4%
Low, August 1989	4.0%
1-year ago	4.9%
Current month	3.8%
The District	
Average 61 months	2.4%
High, October 1984	4.4%
Low, January 1987	0.7%
1-year ago	2.1%
Current month	2.5%

INDUSTRIAL EMPLOYMENT PROFILE:

The Washington and Baltimore Areas, 1980-1988

One of the expected results of the 1990 Census is the melding of the Washington and the Baltimore Metropolitan Statistical Areas (MSA's) into a single Consolidated Metropolitan Statistical Area (CMSA). This new designation would formally recognize that the two metropolitan areas have functionally merged into a unified labor market where a large number of residents of one area commute to work in the other area. Since 1980, the two local metropolitan areas have shared congruent boundaries,[1] but in the 1980 Census there was insufficient interregional commuting to meet the standards for a Consolidated Metropolitan Area designation. This is expected to change as a result of the 1990 Census count.

This study previews the size and the industrial structure of the potential new Washington-Baltimore CMSA, as well as, the job contributions of its component jurisdictions and industries. This article also examines job growth and industrial changes over the period 1980-1988. The count of jobs in the study is from the Non-Agricultural Wage and Salary Employment statistical series, commonly referred to as the "Establishment Survey." Job totals are annual averages.

Industrial Size:

In 1988, a hypothetical combined Washington-Baltimore Area would have contained 3,279,400 jobs. This would have been 3.1 percent of all 1988 nonagricultural wage and salary jobs in the United States. Only two other Metropolitan Statistical Areas (Los Angeles-Long Beach and the New York PMSA, both with 4.1 million jobs) would have been larger. Furthermore, a combined Washington-Baltimore statistical area would have contained more jobs than in 41 of the 50 states. Only the states of California (12.1 million jobs), New York (8.1), Texas (6.6), Florida (5.1), Illinois (5.1), Pennsylvania (5.0), Ohio (4.7), Michigan (3.8) and New Jersey (3.6) contained more jobs than the combined total of the Washington and Baltimore Areas.

Within a unified Washington-Baltimore Area, 66 percent of the jobs in 1988 would have been contributed by the Washington MSA and 34 percent by the Baltimore MSA. The District proper would contribute 20.5 percent of the jobs and Baltimore City 14.3 percent. The Washington suburbs would add 45.5 percent and the Baltimore suburbs 19.8 percent. Thus, the Washington Area job pool in a consolidated area would be nearly twice the size of the Baltimore Area's.

Job Growth 1980-1988:

Between 1980 and 1988, a combined Washington-Baltimore Area would have created 657,700 new jobs. This would have been a 26 percent increase in just eight years or an annual growth rate of 2.9 percent. Thus, the combined area would have produced 4.3 percent of all the 15,633,000 new jobs created in the United States during the 1980-1988 period.

Of the new jobs which would have been created by a combined Washington-Baltimore Area during the eight years, 78 percent would have been produced in the Washington portion of the consolidated area. The suburbs of Washington would have produced 69 percent and the Baltimore suburbs 21 percent or a combined suburban contribution of nine of every ten new jobs. Among the two central cities, the District was more productive in creating new jobs than the City of Baltimore. Over the eight-year period, the District added 57,000 new jobs vs only 6,400 in Baltimore, an annual growth rate of 1.1

[1] The Washington MSA currently contains the following jurisdictions: The District of Columbia; the Virginia cities of Alexandria, Fairfax, Falls Church, Manassas and Manassas Park; the Virginia Counties of Fairfax, Arlington, Prince William, Loudoun and Stafford; and the Maryland Counties of Montgomery, Prince Charles, Frederick and Calvert.

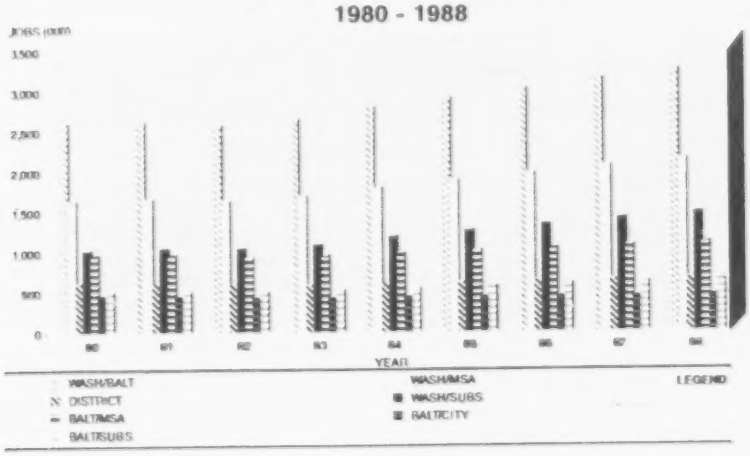
The Baltimore MSA currently includes the City of Baltimore, and the Maryland Counties of Baltimore, Anne Arundel, Howard, Carroll, Harford, and Queen Anne's.

Continued on page 11

INDUSTRIAL EMPLOYMENT PROFILE:

The Washington and Baltimore Areas, 1980 - 1988

Washington - Baltimore Job Growth
1980 - 1988



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Continued from page 9

percent in the District as compared to only 0.2 percent in Baltimore city.

Growth, however, was not even. The study period included two national recessions, one in 1981 and the other in 1982. These two recessions negatively impacted job growth across both metropolitan areas in the early 1980's, but especially in their central cities.

Recessionary Impacts
Washington-Baltimore Area
1981-1983
(employment change-000)

	1981	1982	1983	1984
Wash/Balt	17.7	-40.5	77.9	140.6
Wash MSA	19.9	-12.0	52.8	106.8
District	-5.1	-13.1	-1.3	17.2
Wash-Sub	25.0	1.1	54.1	89.6
Balt MSA	-2.2	-28.5	25.1	33.8
Balt City	-9.1	-18.0	-0.4	14.7
Balt Sub	6.9	-10.5	24.7	19.1

Had the consolidated Washington-Baltimore area existed in the early 1980's, it would have suffered a 40,500 job loss in 1982 as a result of the national recessions. Approximately 70 percent of the loss would have occurred within the Baltimore MSA.

Different patterns, however, occurred in the various components. The Washington suburbs did not show any actual job loss, though in 1982 it was only able to produce 1,100 new jobs. On the other hand, the larger Washington MSA in 1982 recorded a loss of 12,000 jobs, all attributed to losses sustained by the District. In fact, the District lost 19,500 jobs over a period of three straight years (1981-1983). This was 3.2 percent of the District's 1980 job base. The protracted period of loss in the District probably reflects the dual effect of federal government job reductions due to policy changes, as well as the impact of the national recessions.

In Baltimore, both the MSA and its central city lost jobs in two consecutive years of 1981 and 1982. During these two years, the City of Baltimore lost 27,100 jobs, or 5.9 percent of its 1980 job base. Unlike the Washington suburbs, the Baltimore suburbs suffered a job loss in 1982 of 10,500 jobs.

A consolidated metropolitan area, however, would have rebounded quickly from the recessions. In 1983, a consolidated area would have totally recovered all of the lost jobs and recorded six consecutive years of job growth. The Washington MSA also quickly recovered all its lost jobs, as did the Baltimore suburbs. However, the Baltimore MSA took two years to fully recover its losses and the District three years. Baltimore City had a more difficult time recovering. The City was not able to reach its pre-recessionary 1980 job total until 1988. In fact, Baltimore suffered on the way to recovery an additional small loss of 3,400 jobs during 1986. Thus, all components of the potential Washington-Baltimore area demonstrated sensitivity to a major downturn in the national economy, but most jurisdictions recovered rather rapidly.

Industrial Mix in the Washington-Baltimore Area.

Had a consolidated Washington-Baltimore Area existed in 1988, three industries would have dominated the job market with over 75 percent of the jobs. These three major industries would have been Services (30.3 percent), Government (23.7 percent) and Trade (21.4 percent). Compared to the U.S. industrial mix[2], the combined Washington-Baltimore Area in 1988 had more jobs in Services, Government, and Construction, but substantially less in Manufacturing, and slightly less in Finance, Insurance and Real Estate (FIRE), as well as in Trade; Transportation, Communications and Public Utilities (TCPU).

Within the component jurisdictions, the industrial mix varied. In the Washington MSA three industries predominated—Services with 32.4 percent of all jobs, Government with 26.4 percent and Trade with 19.8 percent. This same general profile was evident in the Washington suburbs

[2] Bureau of Labor Statistics, *Employment and Earnings*, Vol. 36 No 3, March of 1989, Table B-1, pp. 43.

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Industrial Mix in the United States & Washington-Baltimore Areas, 1988
(percent)

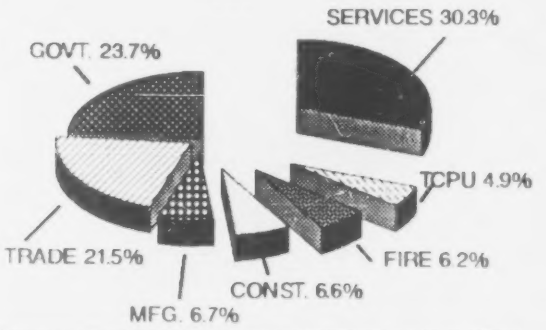
	United States	Wash Balt
Const	5.0	6.6
Mfg	18.7	6.7
TCPU	5.3	4.9
Trade	23.9	21.4
FIRE	6.2	5.9
Services	24.0	30.3
Gov	16.4	23.7

where Services comprised 30.7 percent of all the jobs, Trade 24.5 percent and Government 19.9 percent. In the District, only two industries accounted for 77.1 percent of the total job base—Government (41.0 percent) and Services (36.1 percent).

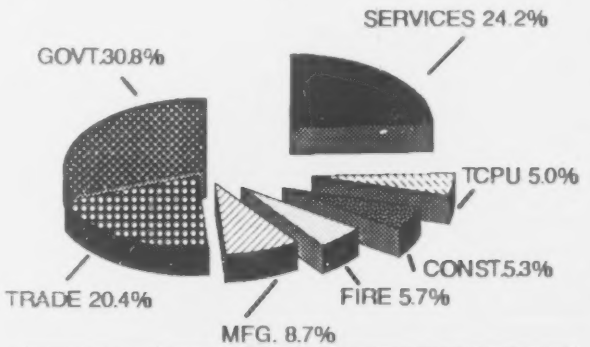
On the Baltimore MSA side of a consolidated area, four industries would have accounted for eight of every ten jobs. As in the Washington MSA, the Services Industry was the largest with 26.4 percent of the job market, followed by Trade (24.6 percent), Government (18.5 percent) and Manufacturing (12.0 percent). In the Baltimore suburbs, Trade predominated with 27.5, followed by Services (23.4 percent), Government (17.7 percent) and Manufacturing (13.6 percent). In the City of Baltimore, Services with 30.5 percent of all jobs was the market leader, not Manufacturing as is often thought. In fact, Manufacturing with only 9.6 percent of all jobs in the City was the fifth ranking industry, following Services were Trade (20.5 percent); Government (19.5 percent); and Finance, Insurance and Real Estate (9.8 percent).

Thus, in every jurisdiction except the District, the Services Industry was the predominate industry. Not surprisingly, Government in the Washington Area was a major contributor. However, Local and State Government jobs were a significant component in the Baltimore jurisdictions. Trade was a very strong contributor in the suburban sections of both MSA's reflecting the proximity of large residential populations. However, Trade had a much larger presence in Baltimore City (20.5 percent) than in the District (9.6 percent). The largest relative concentration of Construction Industry jobs (8.7 percent) was found in the Baltimore suburbs. But the Washington suburbs (8.5 percent) were not far behind. The largest contribution from the Finance, Insurance and Real Estate Industry occurred in Baltimore City. Transportation, Communications and Public Utility jobs tended to be located primarily in the suburban jurisdictions of both MSA's.

Industrial Distribution In Combined Washington - Baltimore MSA's 1988



Industrial Distribution in Combined Washington - Baltimore MSA's 1980



Changes In Industrial Mix: 1980-1988.

Within a potential Washington-Baltimore CMSA, the most fundamental change during the first eight years of the 1980's would have been a significant increase in the market share held by

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the Services Industry and a significant loss of share by Government. Between 1980 and 1988, the Services Industry would have increased its market share from 24.2 percent of all jobs to 30.3 percent, a gain of 6.1 percentage points. On the other hand, Government jobs would have declined from 30.8 percent of all consolidated area jobs to 23.7 percent—a loss of 7.1 percentage points. Other smaller gainers of market share in a consolidated market would have been Trade (1.1 percentage point); Construction; and Finance, Insurance and Real Estate (both 0.9 points).

In addition to Government, two other CMSA industries would have lost market share: Manufacturing (2 percentage points) and Transportation, Communications and Public Utilities (0.1 point).

Within the Washington MSA, two industries alone produced 72.3 percent of the 526,100 new jobs between 1980 and 1988. Services added 263,500 new jobs and Trade 117,100. However, the fastest growing industry in the Washington MSA was Construction, which grew by 63.0 percent as compared to 60.3 percent for the much larger Services Industry. All other private sector industries also showed significant growth, ranging from 44.5 percent in Transportation, Communications and Public Utilities to 35.1 percent in Manufacturing. Government in the Washington MSA showed no change, reflecting a 3.0 percent decline in Federal employment which was offset by a 5.6 percent rate of growth in State and Local Government jobs.

In the District, only the Services industry registered any significant growth over the eight year period. This single industry added 61,200 new jobs, an increase of 33.7 percent. Trade; Manufacturing; Finance, Insurance and Real Estate; and Construction all registered small employment changes ranging from 6.5 percent in Construction to 1.2 percent in FIRE. Both Government and Transportation, Communications and Public Utilities, all lost jobs—6,500 in Government and 500 in TCPU.

In the Washington suburbs, Services with 202,300 new jobs and Trade with 115,800 jobs accounted for 67.8 percent of total suburban growth. The fastest growing industry in the Washington suburbs, however, was Transportation, Communications and Public Utilities which had an eight-year rate of growth of 89.5 percent. All other Industries produced new job growth rates ranging from 79.1 percent in Services to 2.3 percent in Government.

In the Baltimore Area, Services produced over two-thirds of all the 149,600 new MSA jobs, as well as the largest growth rate of 53.6 percent. Construction was the second fastest growing industry adding 47.1 percent more jobs over the eight years. Construction was followed by Finance, Insurance and Real Estate with 35.6 percent and Trade with 25.4 percent.

Three Baltimore MSA industries lost jobs. Manufacturing declined by 17.1 percent, or 27,500 jobs. Interestingly, growth of 22,700 Manufacturing jobs in the Washington MSA almost offset the Baltimore loss. The other two declining industries in the Baltimore MSA were Government with 22,600 fewer jobs than in 1980, and Transportation, Communications and Public Utilities with 3,100 fewer jobs.

In the Baltimore suburbs, as elsewhere, Services produced the most new jobs—62,600. When Services growth is combined with Trade's 57,700 new jobs and Construction's 22,600, the three industries account for 99 percent of all the 143,000 new suburban Baltimore jobs. The Finance, Insurance and Real Estate Industry and Transportation, Communications and Public Utilities Industry both recorded modest suburban gains. Job losses in suburban Baltimore were recorded by Government (18,300 jobs lost) and Manufacturing (3,500 jobs).

The City of Baltimore had over the first eight years of the 1980's three growth industries and four industries which lost employment. Job losses were in Manufacturing (24,000), Transportation, Communications and Public Utilities (11,700) Trade (2,200) and Government (4,300). Services was the clear bright spot, adding 40,100 jobs for a 30.5 percent growth rate in eight years. It is interesting to note, that the City's growth in the Services Industry was strong enough to

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offset the 32,500 jobs lost in Manufacturing and TCPU. Small job gains were also recorded in the Finance, Insurance and Real Estate Industry (7,000) and Construction (1,600).

Observations

If a Washington-Baltimore Consolidated Metropolitan Statistical Area (CMSA) had existed in the 1980's, it would have constituted the third largest metropolitan labor market in the United States, holding more jobs than 4 of every 5 states. Clearly, the industrial giant and growth star of the CMSA would have been the Services Industry. Government would have been the second most important industry with Trade making a significant contribution to the total job pool. These three industries would have accounted for 3 of every 4 jobs in the CMSA. At the level of the hypothetical CMSA, Government would have been the area's most significant declining industry, with about equal job losses in the federal government and the state and local government components. While Manufacturing would have recorded a small loss over the first eight years, the industry's growth in the Washington portion of the area would have been almost strong enough to offset the losses in the Baltimore segment. All jurisdictions of the potential consolidated area demonstrated sensitivity to the national recessions of the early 1980's. All CMSA segments, with the exception of the City of Baltimore, would have recovered rapidly and would have enjoyed six years of very strong job growth, especially the Washington suburbs.

Job Growth in the Washington and Baltimore Metropolitan Statistical Areas
1980-1988
(in thousands)

YEAR	TOTAL WASH/ BALT.	WASH— MSA	DISTRICT	WASH— SUBURBS	BALT. MSA	BALT. CITY	BALT. SUBURBS
1980	2,603.7	1,637.9	616.1	1,021.8	965.8	461.3	504.5
1981	2,621.4	1,657.8	611.0	1,046.8	963.6	452.2	511.4
1982	2,580.9	1,645.8	597.9	1,047.9	935.1	434.2	500.9
1983	2,658.8	1,698.6	596.6	1,102.0	960.2	434.6	525.6
1984	2,799.4	1,805.4	613.8	1,191.6	994.0	449.3	544.7
1985	2,930.3	1,906.3	629.0	1,277.3	1,024.0	454.5	569.5
1986	3,040.4	1,987.9	640.0	1,347.9	1,052.5	450.9	601.6
1987	3,164.4	2,080.1	655.6	1,424.5	1,084.3	456.5	627.8
1988	3,279.4	2,164.0	673.1	1,490.9	1,115.4	467.7	647.7
1980-1988:							
CHANGE	675.7	526.1	57.0	469.1	149.6	6.4	143.2
% CHANGE	26.0	32.1	9.3	45.9	15.5	1.4	28.2
ANNUAL RATE OF CHANGE	2.9	3.5	1.1	4.8	1.8	0.2	3.2

SOURCES: D.C. Department of Employment Services, Maryland Department of Economic and Employment Development, and Bureau of Labor Statistics, Bulletin 2320, *Employment, Hours, and Earnings, 1972-87*, Vols. I & II, March 1989. Data is Non-Agriculatural Wage and Salary Employment by Place of Work.

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Industrial Distribution in the Washington and Baltimore Metropolitan Statistical Areas 1980

(in thousands)

	TOTAL WASH/ BALT.	WASH— MSA	DISTRICT	WASH— SUBURBS	BALT. MSA	BALT. CITY	BALT. SUBURBS
Total	2,603.7	1,637.9	616.1	1,021.8	965.8	461.3	504.5
Const.	137.3	85.9	13.2	72.7	51.4	17.9	33.5
MFG.	225.5	64.7	15.4	49.3	160.8	69.0	91.8
TCPU	130.9	73.3	25.7	47.6	57.6	39.4	18.2
Trade	530.8	312.5	63.6	248.8	218.4	98.1	120.3
Fire	148.6	91.6	34.4	57.2	57.0	38.7	18.3
Services	628.9	437.2	181.5	255.7	191.7	102.6	89.1
Gov.	800.6	571.9	282.2	289.7	228.7	95.6	133.1
Fed.	424.4	370.4	228.6	141.8	54.0	14.3	39.7
S/L	376.2	201.5	53.7	147.8	174.7	81.3	93.4

SOURCES: D.C. Department of Employment Services; Maryland Department of Economic and Employment Development; and Bureau of Labor Statistics, Bulletin 2320, *Employment, Hours, and Earnings, 1972-87*, Vols. I & II, March 1989. Data is Non-Agriculatural Wage and Salary Employment by Place of Work.

Industrial Distribution in the Washington and Baltimore Metropolitan Statistical Areas 1988

(in thousands)

	TOTAL WASH/ BALT.	WASH— MSA	DISTRICT	WASH— SUBURBS	BALT. MSA	BALT. CITY	BALT. SUBURBS
Total	3,279.4	2,164.0	673.1	1,490.9	1,115.4	467.7	647.7
Const.	215.6	140.0	13.4	126.6	75.6	19.5	56.1
MFG.	220.7	87.4	16.4	71.0	133.3	45.0	88.3
TCPU	160.4	105.9	25.5	90.2	54.5	27.7	26.8
Trade	703.4	429.5	64.9	364.6	273.9	95.9	178.0
Fire	204.6	127.3	34.8	92.5	77.3	45.7	31.6
Services	995.1	700.7	242.7	458.0	294.4	142.7	151.7
Gov.	788.2	572.1	275.7	296.4	206.1	91.3	114.8
Fed.	412.3	359.4	217.7	141.7	52.9	17.9	35.0
S/L	365.9	212.7	58.0	154.7	153.2	73.4	79.8

SOURCES: D.C. Department of Employment Services; Maryland Department of Economic and Employment Development; and Bureau of Labor Statistics, Bulletin 2320, *Employment, Hours, and Earnings, 1972-87*, Vols. I & II, March 1989. Data is Non-Agriculatural Wage and Salary Employment by Place of Work.

Metropolitan Areas

In October 1989, the Bureau of Labor Statistics ranked 257 Metropolitan Statistical Areas (MSAs) by preliminary unemployment rates. The Washington Area's jobless rate was 2.6 percent down from 2.8 percent recorded in September. This was the tenth lowest of all 257 areas reporting. A year ago, the Washington Area rate was 2.9 percent.

Comparing the Washington Area with other large metropolitan areas nationwide, the Washington Area's rate at 2.6 percent was the lowest of all the major metropolitan areas.

States

When the District of Columbia (with an October preliminary unemployment rate of 4.4 percent) was ranked with the 50 States, the District had the twenty-ninth highest jobless rate in the country. This was five notches below September's standing. Virginia's rate at 4.1 percent was up from 3.7 percent recorded in September. Maryland's jobless rate at 3.7 percent was down 0.4 percentage point from September. Virginia and Maryland ranked thirty-third and forty-third, respectively, in the standings of the 51 jurisdictions. A year ago, the rates in Virginia and Maryland were 3.7 percent and 4.1 percent, respectively.

Cities

In comparison with the 25 selected central cities, the District of Columbia (with an October preliminary rate of 4.4 percent) had the fifth lowest jobless rate. This was one notch below the position held in September. The average unemployment rate of all 26 cities was 6.6 percent, unchanged from September. A year ago, the rate was 6.5 percent. There were thirteen cities with rates of 6 percent or below. The District of Columbia at 4.4 percent was in this grouping.

Detroit joblessness at 12.2 percent is the highest among the 26 selected central cities. It was a fraction (0.1 percentage point) below its September rate and 2.0 percent above its rate in October 1988. Newark joined the double digiters in October, posting a rate of 10.0 percent. A year ago, Newark's rate was 7.9 percent.

Of the 26 selected central cities, over the month, thirteen reported declines in joblessness, while thirteen reported increases. Judging from the last few months, the overall rate seems to be edging upwards. The largest decline was 3.4 percent posted in New Orleans. Gary and Philadelphia recorded decreases of 1.2 percent and 1.1 percent, respectively. The largest increases in joblessness were recorded in Newark and Detroit—2.1 percent and 2.0 percent, respectively. Milwaukee posted a 1.3 percent rise in joblessness, Dayton a 1.2 percent rise, and Boston a 1.0 percent rise.

Unemployment Rates in Selected Cities*

	October	
	1989*	1988
1. San Francisco, CA	3.5	4.0
2. Salt Lake City, UT	3.5	4.1
3. Boston, MA	4.1	3.1
4. Pittsburgh, PA	4.1	5.0
5. District of Columbia	**4.4**	**5.3**
6. Los Angeles, CA	4.7	4.9
7. Philadelphia, PA	5.0	6.1
8. Milwaukee, WI	5.1	3.9
9. Columbus, OH	5.2	4.9
10. New York, NY	5.4	4.9
11. Cincinnati, OH	5.8	5.5
12. Houston, TX	5.8	6.6
13. Dallas, TX	5.8	6.6
14. Baltimore, MD	6.2	7.1
15. New Orleans, LA	6.6	10.0
16. Buffalo, NY	7.1	6.7
17. Birmingham, AL	7.1	7.8
18. Miami, FL	7.8	6.4
19. Cleveland, OH	8.0	7.7
20. Chicago, IL	8.2	7.5
21. St. Louis, MO	8.2	8.4
22. Atlanta, GA	8.3	7.6
23. Gary, IN	9.5	9.7
24. Dayton, OH	9.8	7.6
25. Newark, NJ.	10.0	7.9
26. Detroit, MI	12.2	10.2

*Preliminary unemployment rates.

Unemployment Insurance Activities November 1989

During November 1989, the District of Columbia processed 2,630 unemployment compensation initial claims for benefits to former workers in Washington, D.C. This was a 10 percent decrease from October claims this year. It is 13 percent below November 1988, and also below the 2,938 average monthly claimsload for this year to date. The drop in claims from last month was to be expected since October was seasonally high because of the change-of-base-period surge in claimants.

Washington, D.C.
Area Consumer Price Index
(All Urban Consumers—CPI-U)[a]

	Nov 1989	Percent Change 2 months Ago	Year Ago
All Items			
U.S.	125.9	+0.7	+4.7
Washington Area	130.5	+0.3	+5.9
Expenditure Category			
Food & Beverage	127.8	+0.8	+5.5
Housing	131.2	-0.4	+5.5
Apparel & Upkeep	139.7	-1.7	+6.6
Transportation	117.0	+2.3	+5.2
Medical Care	149.6	+1.6	+6.7
Entertainment	128.8	1.3	+4.4
Other Goods & Services	160.0	+1.5	+12.0
Special Index: Energy[b]	95.7	-4.2	+4.7

a. 1982-84=100, except as noted.
b. June 1978=100.

SOURCE: U.S. Department of Labor, Bureau of Labor Statistics, table prepared by the Department of Employment Services, Labor Market Information and Research Staff.

Hours and Earnings in Manufacturing

Total Manufacturing Average Weekly Earnings in the Metropolitan Area for November 1989 increased $10.84. Average Weekly Hours rose slightly .6 hour. Average Hourly Earnings increased 9 cents.

In the Durable Goods Sector, Stone, Clay and Glass Products had a decrease in Hourly Earnings of 33 cents due to an increase in the proportion of lower paid employees. Electric Machinery, Equipment and Supplies reflects an increase in Weekly Earnings of $3.57 and an increase in Hourly Earnings of 17 cents because of an increase in the proportion of higher paid employees.

In the Non-Durable Goods Sector, Food and Kindred Products' Weekly Earnings rose $3.92, as the Hourly Earnings rose 40 cents. The rise was due to an increase in the proportion of higher paid employees.

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Department of Employment Services

Selected Unemployment Insurance Benefit Statistics
(Regular Programs)
District of Columbia
November 1989

	Nov 1989	Oct 1989	Nov 1988	% Change From Oct 1989	% Change From Nov 1988
State UI Program[a]					
Initial Claims Taken	2,520	2,768	2,877	-9.0	-12.4
Weeks of Unemployment Claimed	29,591	29,200	30,692	+1.3	-3.6
Weeks of Unemployment Compensated	29,764	27,936	29,894	+6.5	-0.4
Total Benefits Paid	$5,855,500	$5,520,084	$5,480,492	+6.1	+6.8
Average Weekly Benefit Payment	$196.73	$197.60	$183.33	-0.4	+7.3
Number of First Payments	1,372	1,369	1,431	+0.2	-4.1
Number of Final Payments	822	764	854	+7.6	-3.7
Total Beneficiaries	7,847	7,912	7,839	-0.8	+0.1
Federal Program[b]					
Initial Claims Taken	81	112	101	-27.7	-19.8
Weeks of Unemployment Claimed	2,136	2,061	2,150	+3.6	-0.7
Weeks of Unemployment Compensated	2,301	2,290	2,214	+0.5	+3.9
Total Benefits Paid	$516,713	$529,274	$460,367	-2.4	+12.2
Average Weekly Benefit Payment	$224.56	$231.12	$207.93	-2.8	+8.0
Number of First Payments	108	110	106	-1.8	+1.9
Number of Final Payments	82	104	60	-21.1	+36.7
Total Beneficiaries	619	664	555	-6.8	+11.5
Ex-Servicepersons Program[c]					
Initial Claims Taken	27	29	32	-6.9	-15.6
Weeks of Unemployment Claimed	293	254	308	+15.4	-4.9
Weeks of Unemployment Compensated	226	204	249	+10.8	-9.2
Total Benefits Paid	$48,895	$44,512	$49,542	+9.8	-1.3
Average Weekly Benefit Payment	$216.35	$218.20	$198.96	-0.8	+8.7
Number of First Payments	25	21	24	+19.0	+4.2
Number of Final Payments	16	10	18	+60.0	-11.1
Total Beneficiaries	73	64	79	+14.1	-7.6
Total—All Programs					
Initial Claims Taken	2,628	2,909	3,010	-9.7	-12.7
Weeks of Unemployment Claimed	32,020	31,515	33,150	+1.6	-3.4
Weeks of Unemployment Compensated	32,291	30,430	32,357	+6.1	-0.2
Total Benefits Paid	$6,421,108	$6,093,870	$5,990,401	+5.4	+7.2
Average Weekly Benefit Payment	$198.85	$200.26	$185.13	-0.7	+7.4
Number of First Payments	1,505	1,500	1,561	+0.3	-3.6
Number of Final Payments	920	878	932	+4.8	-1.3
Total Beneficiaries	8,539	8,640	8,473	-1.2	+0.8

a. Includes joint claims with Unemployment Compensation for Federal Employees (UCFE) and or Unemployment Compensation for Ex-Servicepersons (UCX)

b. Includes joint claims with Unemployment Compensation for Ex-Servicepersons (UCX)

c. No joint claims

The Washington, D.C. Area Consumer Price Index

The Consumer Price Index for All Urban Consumers (CPI-U) for the Washington, D.C. Metropolitan Statistical Area rose 0.3 percent during the 2-months ended in November, to a level of 130.5 (1982-84=100). For the 12-month period ended in November, the CPI-U rose 5.9 percent. The Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) also rose 0.1 percent from September to November. The November level of 129.6 (1982-84=100) was 5.7 percent higher than the index in November 1988.

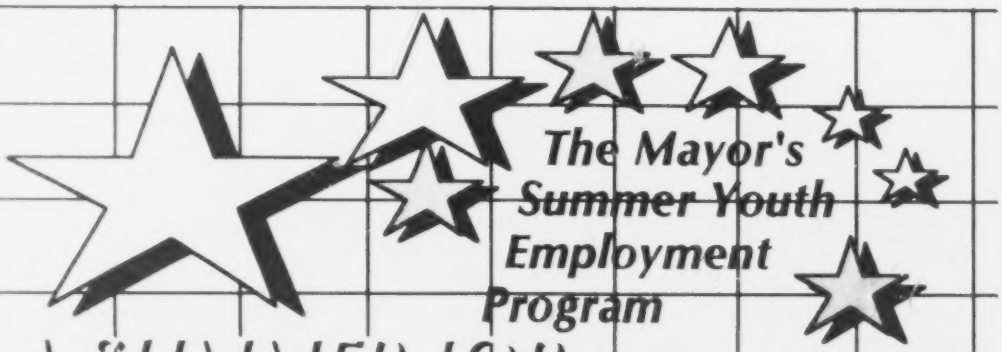
The 0.3 percent increase in the CPI-U from September to November follows an increase of 1.8 percent in the preceding 2-month period. The indexes for housing, apparel, and entertainment, which increased sharply during the July to September period, declined between September and November. Partially offsetting the moderation in these components were larger increases in the indexes for transportation, food, and medical care.

Earnings of Production Workers in Manufacturing
Washington Metropolitan Area
November 1989

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Nov. 1989	Oct. 1989	Nov. 1988	Nov. 1989	Oct. 1989	Nov. 1988	Nov. 1989	Oct. 1989	Nov. 1988
Total Manufacturing	480.09	469.25	457.41	39.0	38.4	39.5	12.31	12.22	11.58
Durable Goods	464.26	454.17	464.95	40.3	39.7	42.5	11.52	11.44	10.94
Stone Clay & Glass Products	571.32	553.16	571.45	52.9	49.7	48.8	10.80	11.13	11.71
Electric Machinery, Equipment & Supplies	543.95	540.38	471.95	43.0	43.3	40.2	12.65	12.48	11.74
Other Durable Goods	402.54	385.18	436.38	36.2	35.5	42.0	11.12	10.85	10.39
Non-Durable Goods	494.22	480.25	449.81	37.9	37.2	36.9	13.04	12.91	12.19
Food & Kindred Products	470.26	466.34	410.67	42.1	43.3	37.3	11.17	10.77	11.01
Printing & Publishing	518.76	500.54	481.42	36.1	35.2	35.9	14.37	14.22	13.41
Other Non-Durable Goods	411.84	407.95	351.29	42.9	42.1	40.8	9.60	9.69	8.61

Total Production Workers	Nov. 1989	Oct. 1989	Nov. 1988
	40,000	39,600	43,800

W A S H I N G T O N , D . C .



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